

**SHELBY COUNTY GOVERNMENT
REQUEST FOR PROPOSAL
PUBLIC OFFICIAL BONDS**

FORM 1 - BROKER/AGENT QUESTIONNAIRE

1. Explain your firm's ownership structure.

2. How many years has your firm been in business?

3. Describe the industry diversity of your firm's client base.

4. Describe the account team's expertise and experience in dealing with public sector coverage.

5. Describe the expertise and experience of the account team proposing to place surety bonds, in particular for public entities and officials.

6. Identify the names and location of your proposed account service team that would actually service the County's account. Describe each member's service role. Provide the qualifications of each member including title, role, education, tenure at firm, years of relevant experience, years and type of public sector experience. Who will the day-to-day contacts be for the account? (Attached separate sheet with this information.)

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FORM 2 - CERTIFICATION

**I certify that (insert name of firm)_____did not obtain
a commitment to underwrite the proposed insurance prior to the date of this Request
For Proposals:**

Insurance Company

SIGNATURE

NAME

TITLE

COMPANY

PHONE NUMBER

FAX NUMBER

E-MAIL ADDRESS

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FORM 3 –PREMIUM PROPOSAL

You may include your own proposal form but we request that you complete this sheet indicating basic information regarding the premium, rates and fees.

Brokerage fees/commissions shall be provided separately at the end of this form.

Estimated Total Premium: _____

- ☐ **This proposal conforms to County's Request for Proposals; or**
☐ **This proposal deviates from County's Request for Proposals as follows: (Attach separate sheets, if necessary)**

Insurance Company: _____

Best's Rating for 2 most recent years _____

Broker/Agent's Name: _____

Signature: _____

Title: _____ **Date:** _____

Brokerage/Agent Fees or Commissions: _____

Brokerage fee shall include:

- **Any basic commission negotiated with the insurers;**
- **Commission contingent on volume or profit**
- **Revenue/income arising from any other source.**

Will your firm agree to provide this information in the future at each renewal? _____

Are there any financial ties between your firm and any of the insurers you are including in your proposal? If yes, please explain. _____

Is any aspect of your firm's business financed by an insurer? If yes, please explain.
